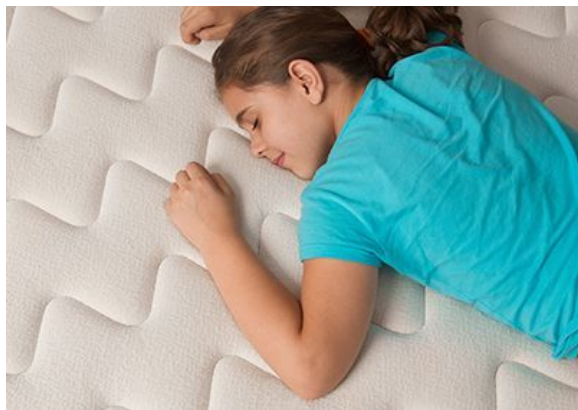


## Mattresses - US - April 2017

Report Price: £3215.29 | \$3995.00 | €3762.21

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"The mattress category has undergone significant change in recent years due to new product segmentation, changing consumer needs, and e-commerce sales. Mattress purchasers are primarily quality driven, especially as sleep becomes a health priority. Future market growth will result from brands and retailers that target core buyers and promote sales beyond replacement."

**- Stephen Brown, Research Analyst**

This report looks at the following areas:

- Replacement as reason for purchase hinders growth
- Online brands threaten traditional retailers

**BUY THIS  
REPORT NOW**

**VISIT:**  
[store.mintel.com](http://store.mintel.com)

**CALL:**  
EMEA  
+44 (0) 20 7606 4533

Brazil  
0800 095 9094

Americas  
+1 (312) 943 5250

China  
+86 (21) 6032 7300

APAC  
+61 (0) 2 8284 8100

**EMAIL:**  
[reports@mintel.com](mailto:reports@mintel.com)

### DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

# Mattresses - US - April 2017

Report Price: £3215.29 | \$3995.00 | €3762.21

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

### Overview

What you need to know

Definition

### Executive Summary

Market overview

Housing market and desire for quality drive sales of mattresses and sleep equipment

Figure 1: Total US sales and fan chart forecast of mattress and other sleep equipment, at current prices, 2011-21

The issues

Replacement as reason for purchase hinders growth

Figure 2: Select reasons for mattress purchase, by age, January 2017

Online brands threaten traditional retailers

Figure 3: Attitude toward buying a mattress online, by age, January 2017

The opportunities

Recent purchasers gravitate toward newer mattress types

Figure 4: Any ownership (net), recent purchase, and purchase intent of mattresses, by mattress type, January 2017

Growing importance of sleep has positive impact on the market

Figure 5: Sleeping problems as reason for mattress purchase, by age, January 2017

Comfort and quality drive spending on premium options

Figure 6: Comfort level and quality as purchase influencers, by age, January 2017

What it means

### The Market – What You Need to Know

Healthy housing market and innovation boost spending

Consumers buying higher-priced mattresses

Housing starts and consumer confidence amplify spending

### Market Size and Forecast

Housing starts and category innovation drive sales of mattresses

Figure 7: Total US sales and fan chart forecast of mattress and other sleep equipment, at current prices, 2011-21

Figure 8: Total US retail sales and forecast of mattress and other sleep equipment, at current prices, 2011-21

### Market Perspective

Consumers willing to spend on premium mattresses

Figure 9: Mattress purchases, by amount spent, 2011-16

Sleep issues create market opportunities

### Market Factors

Housing starts deliver more bedrooms

Figure 10: New residential home construction, 2010-16

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Mattresses - US - April 2017

Report Price: £3215.29 | \$3995.00 | €3762.21

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Consumer confidence bolsters spending on mattresses

Figure 11: Consumer Sentiment Index, January 2011-17

Multigenerational living creates diverse mattress needs

## Key Players – What You Need to Know

Specialty stores lead the market

Online mattresses simplify shopping

Technology as the next sleep aid

## What's In?

Specialty mattress stores maintain leadership

Figure 12: Email and online advertising by Mattress Firm, January-February 2017

Economy and discount retailers challenge specialty stores

Figure 13: Email sales promotions by Art Van Furniture, February-March 2017

Online mattresses gain traction

Figure 14: Site visits among select mattress brands and retailers, December 2015

Retailer partnerships bring online mattresses in-store

Figure 15: Email advertisement by West Elm featuring Casper, February 2017

Reviews vital to online mattress brands

IKEA offers value solutions to larger households

Figure 16: IKEA email advertisement targeting family households, January 2017

## What's Out?

Retail market is saturated with specialty stores

Temper Sealy loses contract with Mattress Firm

## What's Next?

Consumer electronics that monitor sleep

Mattresses for a personalized night's sleep

Figure 17: Sleep Number unveils its 360 smart bed at CES, January 2017

Online mattresses reach select consumers

## The Consumer – What You Need to Know

Innerspring leads in ownership, but new consumers seek alternatives

Replacement tops reasons for mattress purchase

Visiting a store and referrals are most common information sources

Brick-and-mortar stores capture sales, but online has opportunity

Comfort level and durability influence most purchases

Quality leads over price when buying the right mattress

## Mattress Ownership and Recent Purchase

Innerspring remains a staple in category

Figure 18: Mattress ownership – Any current ownership, January 2017

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

## Mattresses - US - April 2017

Report Price: £3215.29 | \$3995.00 | €3762.21

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

### Recent purchases and purchase intent threaten innerspring

Figure 19: Recent purchase and plans to purchase mattresses, January 2017

### Mattress type purchased varies by age

Figure 20: Recent purchase of innerspring, specialty foam, and hybrid mattresses, by age, January 2017

### Young adults seek inexpensive options for sleep equipment

Figure 21: Recent purchase of sleep equipment, by age, January 2017

### Household size drives up ownership of all mattress types

Figure 22: Any mattress ownership (net), by Hispanic origin and by household size, January 2017

In their own words...

## Reasons for Purchasing Mattresses

### Replacement tops reasons for purchase, but quality matters

Figure 23: Reasons for mattress purchase, January 2017

### Sleep issues among core buyers bring them to market

Figure 24: Sleeping problems as reason for mattress purchase, by age, January 2017

### Lifestage needs create more reasons for purchase

Figure 25: Select reasons for mattress purchase, by age, January 2017

### Mattress sales capture Hispanic purchasers

Figure 26: Sale or special offer as reason for mattress purchase, by Hispanic origin, January 2017

## Information on Mattresses and Mattress Buying

### In-store is leading source of information

Figure 27: Information sources for mattresses, January 2017

### Newness to the category drives word-of-mouth referrals

Figure 28: Friends/family as information sources for mattresses, by age, January 2017

### Online media help guide core consumers along purchase journey

Figure 29: Online mattress advertisements by Levin Furniture and Mattress Firm, May 2016-February 2017

Figure 30: Select information sources for mattresses, by age, January 2017

### Retailer catalogs and television as a means to attract Hispanics

Figure 31: Catalogs and TV networks as information sources for mattresses, by Hispanic origin, January 2017

In their own words...

## Retailers Shopped

### Specialty stores lead among retailers shopped

Figure 32: Mattress retailers shopped, January 2017

### In-store leads purchase, but opportunity exists for online

Figure 33: Mattress purchased in-store versus online, January 2017

In their own words...

### Retailer type varies by age and lifestage needs

Figure 34: In-store purchases, by age, January 2017

Figure 35: Select mattress retailers shopped, by age, January 2017

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

## Mattresses - US - April 2017

Report Price: £3215.29 | \$3995.00 | €3762.21

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Hispanics look for value

Figure 36: Select mattress retailers shopped, by Hispanic origin, January 2017

In their own words...

### Mattress Purchase Influencers

Comfort and design-related attributes reach most purchasers

Figure 37: TURF analysis – Mattress purchase influencers, January 2017

Methodology

Figure 38: Table – TURF analysis – Purchasing attributes, January 2017

Importance of comfort and quality grows with age

Figure 39: Select purchase influencers, by age, January 2017

Young adults place importance on secondary attributes

Figure 40: Secondary purchase influencers, by age, January 2017

Hispanics align with parents on secondary attributes

Figure 41: Secondary purchase influencers, by Hispanic origin, January 2017

### Attitudes toward Mattresses and Mattress Buying

Mattress purchasers put quality and sleep ahead of price

Figure 42: Attitudes toward mattresses and mattress buying, January 2017

In their own words...

Importance of quality changes with age

Figure 43: Attitudes reflecting importance of quality in mattresses, by age, January 2017

Online mattresses slowly gain appeal

Figure 44: Attitudes related to online mattress shopping, by age, January 2017

Hispanics seek extended life in their mattresses

Figure 45: Select attitudes toward mattresses and mattress buying, by Hispanic origin, January 2017

### Appendix – Data Sources and Abbreviations

Data sources

Sales data

Fan chart forecast

Consumer survey data

Direct marketing creative

Abbreviations

### Appendix – Market

Figure 46: Total US retail sales and forecast of mattresses and other sleep equipment, at inflation-adjusted prices, 2011-21

Figure 47: Mattress purchasers, total base samples, fall 2011-fall 2016

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)